MONTANA
State
Library

PO Box 201800
1515 East 6th Avenue
Helena, MT 59620
(406) 444-3115

December 11, 2017

Dear Potential Montana Shared Catalog Applicant:

It is with great pleasure that we announce the opening of the application period for Montana libraries interested in joining the Montana Shared Catalog during the coming year. Applications will be accepted until 5:00 PM (MST), Friday, February 9, 2018. See the application for the review, approval and implementation schedules. We very much appreciate the major roles the Network Advisory Council and State Library Commission play in this application review and approval process.

We accept applications from all library types. Acceptance of your application depends upon the number of applications received, library type and size, support staff limitations, and the amount of funds available to pay vendor startup costs.

We welcome your application. If you have not already done so, please contact me for a cost estimate. Please follow the instructions carefully and complete the application in its entirety, paying special attention to the essay questions. Do not hesitate to email or call, at any time, with any questions you may have. I sincerely look forward to receiving your application.

Cara Orban
Montana State Library
Montana Shared Catalog Director

**APPLICATION DEADLINE FOR ALL LIBRARIES: 5:00 PM (MST), February 9, 2018
The complete application must be received at MSL on or before this deadline.**

Application Timetables

I. Libraries requesting financial assistance:
- Obtain a cost estimate for joining the MSC prior to preparing the application. Contact Cara Orban at corban@mt.gov or 406-444-5350.
- Complete and submit this application by 5:00 p.m., Friday, February 9, 2018.
- Qualification screening by the MSC Staff and MSC Executive Board will take place Feb 12-16, 2018.
- Screened applications reviewed by MSL will be submitted to the Director of Statewide Library Resources for Library Development budget planning, February 19, 2018.
- A funding request to fund new MSC libraries is submitted to the Network Advisory Council for Library Development funding prioritization at their meeting on March 13, 2018.
- State Librarian recommends new MSC libraries and available funds to the State Library Commission for action at the Commission's meeting during MLA 2018 in Bozeman.
- Accepted libraries will be notified of available funding as soon as possible following the Commission meeting.
- Libraries must confirm acceptance by May 4, 2018.

A.   Implementation Scheduling
   Two implementation schedules are available to libraries applying in 2018: July-October 2018 or January-April 2019.
- Library profiles and base configurations added to the MSC database: July 2018
- Data libraries begin migration: September 2018
- Non-data libraries begin retrospective conversion: September 2018
- All data libraries live no later than March 2019
- All non-data libraries go live following retrospective cataloging of at least 80% of circulating collection, or no later than September 30, 2019
- Libraries not applying for financial assistance must still submit an application for membership and will undergo the same review schedule listed above
- Implementation schedule for applications not requesting financial assistance and received after the February 9, 2018 deadline will be determined by the availability and workload of the MSC support staff

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Process

The Montana Shared Catalog (MSC) seeks applications for new members. For libraries that wish to join the consortium, the Montana State Library (MSL) may make financial assistance available[1]. For this round of applications, these funds will be awarded in the order the applications merit, as determined by the evaluation process. For selected libraries, financial assistance will be provided to cover up to 100% of the vendor costs for software licensing, maintenance, project management and data migration costs. These costs are typically limited to the ILS vendor (SirsiDynix) and a data migration sub-contractor. Overall, it is MSL's intent to assist with funding the start-up costs to the greatest extent possible. MSL project funds will be paid directly to the vendor on behalf of the joining library.

Libraries wanting to join the MSC with sufficient funds of their own and, otherwise being qualified, may apply to join the MSC without requesting financial assistance. Approval of all applications depends upon the application passing the screening process, the amount of funding available, and the availability of MSC resources and staff time.

About this Program

The Montana Shared Catalog began in 2002 as a statewide project sponsored, in part, by the Montana State Library. Its operational costs are paid for in part by annual contributions from the participating libraries and in part from the state. In FY2017, the cost split was 59% participating libraries and 41% state and state or federal funding. MSL's share in funding the project varies from year to year, depending on the number of new libraries and their startup funding needs. MSL also subsidizes staff and operational costs to a great degree for the consortium. MSL works with Montana libraries to ensure the delivery of quality, standards-based, networked library materials and services to all Montanans.

The MSC currently uses SirsiDynix's *Symphony* integrated library system (ILS). You may view the MSC public interface, called *Enterprise*, at: http://mtsc.sdp.sirsi.net. Internet and cloud-based apps for mobile devices such as smart phones and tablets are also available for public use of the catalog. A software client, called WorkFlows, is used by library staff to support circulation, cataloging, acquisitions, serial control, academic reserves, material booking, ILL, outreach and other administrative functions. A cloud-based application called "BLUEcloud Analytics" provides detailed statistics for library staff.

Library Program types

- Program 1—Large library: Having both 100,000 or more bibliographic records, and 25,000 or more service area population (or over 15,000 full-time-equivalent students, staff, and faculty). Counts for library systems are figured as the sum of their individual counts[2].

- Program 2—Middle-sized library: Having 35,000 to 100,000 bibliographic records, *and* 10,000 to 24,999 service area population (or 5,000 to 14,999 full-time-equivalent students, staff, and faculty). Counts for library systems or consortium are figured as the sum of their individual counts.

- Program 3—Small library: Not a "Large or a Medium Library".

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[1] The Network Advisory Council has recommended, and the State Library Commission has agreed that pending approval, LSTA funds be used to add libraries to the MSC.

[2] For instance, if a library has 17,000 patrons, and its four branches add 2,000 patrons each, the total count would be 25,000 registered borrowers; likewise, this would be figured for bibliographic records. Library systems and consortium are asked to apply as systems or consortium.

Eligibility

- Publicly funded or not-for-profit libraries including academic, school, public, or special, are eligible and encouraged to apply. For-profit libraries are invited to join the MSC, but are not eligible for LSTA funding.
- Libraries may apply for either the Large Library program, the Middle Library program, or the Small Library program, but not more than one program.
- Applicant libraries must appear in the online [Montana Library Directory](#).
- Applicant libraries must have an approved Collection Management Policy.
- Applicants must be enrolled as a member of OCLC, or agree to enroll prior to July 1, 2018, and must maintain annual enrollment while a member of the MSC. Information on OCLC membership and enrollment can be found at: http://libraries.msl.mt.gov/statewide_projects/oclc_services.aspx
- Applicant libraries must have, or have installed prior to implementation; a reliable, broadband internet connection with static Internet protocol (IP) addresses.
- Applicant libraries must choose from a menu of [circulation policy rules](#) and cataloging policies.
- The reviewers are interested in proposals that:
    - Mutually improve the delivery of library materials and services to library users;
    - Further the process of libraries-helping-libraries and resource sharing;
    - Increase collegial interaction between participating librarians;
    - Promote collaborative and consortium behavior in general;
    - Further MSL's goal of developing libraries through networked services; and
    - Support and improve the Montana Shared Catalog consortium.
- Proposals will be scored using the above six criteria.

Eligible Program Expenses and Financial assistance available

Applicants may request support for implementation related costs, such as licensing, bibliographic conversion, bibliographic and patron data loads, project management, and for costs involved with record conversion. MSL project funds may be available to fund these costs[3].

Application Review Process

All applications will be screened for compliance with prequalifying criteria by MSC administration and the MSC Executive Board. Those applications that pass initial screening are then reviewed by MSL managers to aid in preparing the Library Development budget for the coming year. The Network Advisory Council is then informed of the qualified libraries. The State Librarian presents the qualified applications to the State Library Commission for final approval.

Your library's completed application must be received at the State Library by Friday, February 9, 2018, 5:00 p.m. MST. Late or incomplete applications will not be considered. Electronic submissions are required.

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[3] Funds, if available will be allocated to cover the entire library startup costs charged by the vendor.

Program Details

Q: What's the primary value of being a MSC library?
A: By working in partnership with other MSC libraries, you will have the opportunity to spend more time with your patrons and less time worrying about the technical needs of your ILS. You will more efficiently provide higher value services and more content to your library's users than you could ever afford on your own. Resource sharing group libraries see the highest return on investment in their MSC membership.

Q: Who is the Montana Shared Catalog?
A: The Montana Shared Catalog is a voluntary consortium comprised of 177 libraries and branches. MSC libraries are found in 99 Montana communities, serving a combined population of nearly 450,000 registered users.

      The MSC currently includes 5 academic libraries, 90 public libraries or public library branches, 71 school libraries, and 11 special (law, medical, government, and museum) libraries, stretching across the state from Troy to Ekalaka and Plentywood to Lima.

Q: Where are these libraries located?
A: 105 are in Western Montana (61%), 32 in Central Montana (17%), 24 in Eastern Montana (14%), and 16 (8%) on the Hi-Line.

Q: How many librarians are employed in MSC libraries?
A: Nearly 500. MSC librarians work together on MSC-related issues; in many ways you are gaining a large virtual community of practice when you and your staff become part of the consortium.

Q: How is the MSC governed and what is the role of the MSC Admin staff?
A: MSC Admin are employees of the State Library and they work to maintain the efficiency and effectiveness of the MSC by setting system configuration policy that supports the goals of the consortium.
      - Policies and By-Laws are set by the MSC Executive Board, with approval by the membership and in partnership with the State Library.
      - Budgets are prepared by the MSC Director and submitted to the MSC Executive Board for review and then discussed and voted on by the membership during their annual, Spring membership meetings.
      - MSC support staff provide training resources and ongoing technical support. MSC members can and are expected to provide assistance and training to new members. Members providing this training will have travel expenses reimbursed by the MSC.
      - Decisions about catalog content are made by the MSC Content Management Committee in conjunction with the MSC Admin staff. The MSC Executive Board appoint the Content Management Committee.

Q: On what application and computer hardware does the MSC run?
A: We use SirsiDynix Corporation's Symphony[4] integrated library system (ILS). The software is state-of-the-art and is routinely updated with fixes and enhancements. The patron or student uses the online, web-based interface called "Enterprise". Library staff have a workstation based client called "Workflows" that interacts with the Symphony servers. BLUEcloud Analytics is a cloud-based application allowing library directors and staff to query the system for statistical information on circulation, cataloging, acquisitions and user activity.

The Symphony Production and Test Servers, as well as Enterprise and BLUEcloud Analytics platforms are hosted on SirsiDynix SaaS (Software-as-a-Service) servers in Atlanta and are available remotely to

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[4] http://www.sirsidynix.com/symphony

library staff and/or patrons. Connectivity of these platforms is robust and can be monitored on the SirsiDynix Status page.

Q: Who fixes the MSC when there are technical issues?
A: MSC Admin staff monitors the system, fixes technical issues and makes configuration adjustments as necessary. Your library won't need on-site staff people to keep your staff interface and online catalog functioning. You may need on-site staff people to keep your local area network running smoothly and your workstations and related peripheral equipment online. If the MSC Staff can't resolve software problems, they have direct line with priority access to the vendor's customer support department.

Server and platform upgrades are performed by SirsiDynix staff in conjunction with MSC Support staff. The utmost consideration of member library needs is considered when upgrades are scheduled and advanced notice is given. Downtime is scheduled to cause the least disruption of service.

Q: Why should my library join? What's the best part of being a MSC consortium member?
A: Membership in the consortium is a great opportunity for Montana libraries to improve their quantity, type and quality of library materials and services through collaboration, resource sharing, and cooperation. The MSC facilitates library development and frees library staff from dealing with locally hosted servers and system software.

Some MSC members have formed resource sharing groups that not only share their patrons and collections, but also work together in ways that help each other stretch their materials purchasing budgets. Perhaps most significantly, MSC members share their experience and imagination. When you join the Montana Shared Catalog, you are joining a network of libraries and librarians statewide with whom you can share not only an ILS but also library materials, ideas, inspiration, solutions to your challenges, and so much more.

Q: What are some of the obligations of being part of the MSC?
A: Once you join the MSC, the library has made a long-term commitment. The expense of exiting the MSC is fairly substantial and would be borne by the library requesting to do so.

This is a shared integrated library system and bibliographic database, used by 177 member libraries. It must work for all. Belonging to a consortium requires that your library commits to communicating with other MSC members, committees and the MSC Admin team. You will need to make operational and financial compromises and share the consequences of decisions that lack immediate benefit for your library, for the greater good of the consortium. However, decisions are made to ensure the health and sustainability of the program, with overall member benefit in mind.

Q: How is the MSC financed?
A: MSC member libraries pay an annual fee to cover operational and staff costs. The State Library provides start-up financial assistance to libraries joining the MSC, hosts the staff workspace, and pays the salaries of 2.33 operational staff. The other 2.66 staff salary is paid by the membership.

Q: What is the MSC budget?
A: The budget fiscal year is July 1 through June 30. The budget is broken down by operational and administration costs. The MSC membership votes to approve a budget at the annual spring members meeting. The current MSC budget and cost formula documents are available at http://libraries.msl.mt.gov/Statewide_Projects/Montana_Shared_Catalog/For_Members

Q: Is there a MSC Strategic plan?
A: Yes! The MSC Strategic Plan was approved by the membership during their 2015 Spring members meeting. As of December 2017 the MSC Executive Board is in the process of reviewing the Strategic Plan for future planning. The current plan can be viewed here: http://docs.msl.mt.gov/pdfs/SharedCatalog/StratPlan2016-18.pdf

Q: How are MSC-related decisions made?
A: Consortium members make every effort to reach decisions by consensus and in the spirit of cooperation. In the event that consensus does not occur, a majority of the membership present at a members meeting or voting electronically is required. The MSC Executive Board and the Content Management Committee attend to operational and procedural decisions, and present suggestions to the membership for approval. The Montana State Library Commission makes some funding decisions, with advice from the State Librarian and the Network Advisory Council.

Your library, regardless of size or type, has an equal voice in all the policy and financial decisions affecting the consortium.

Q: How much does it cost to join the MSC?
A: Start-up costs range from $900 for small, un-automated libraries to up to $30,000 for large, automated library systems that migrate their data. Montana-specific start-up costs have been negotiated with SirsiDynix, toward the goal of making the MSC affordable for all but the very smallest of Montana's libraries. A competitive MSC-start-up assistance program helps libraries afford the initial license and data-related expenses of joining the MSC. Start-up costs not associated with direct vendor costs such as; peripheral equipment (mobile devices, receipt printers, barcode scanners and/or barcodes) and new library training are paid by the library and included in the start-up cost estimate. The MSC Director will supply your library with two cost estimates: a start-up and an ongoing cost estimate.

The MSC is a bargain if you compare the costs of being a MSC library versus running and maintaining your own system. The initial and ongoing out-of-pocket and capital costs, combined with the time it takes to run a local system, and the value of librarians' time spent on computers instead of users, all add together to make owning your own system an expensive proposition.

A careful accounting reveals that the costs of being a MSC member are equal to or less than the costs for having a standalone automated catalog and circulation system.

Q: What is the annual cost of remaining a MSC member library?
A: Annual ongoing costs range from $800 for small non-circulating libraries to more than $35,000 for the largest member libraries. Contact the MSC Director for an estimate of your library's anticipated annual costs. **MSC membership requires enrollment in OCLC Group Services which is an additional annual cost for the library if they are not already enrolled.**

The costs of running the MSC are subsidized by the State to minimize costs to libraries. Libraries with larger collections, more users and higher yearly circulations pay more than libraries with smaller title, user and circulation counts. The smallest libraries receive an additional title, patron, and cost share break.
Our intent is to use a measure that equitably distributes the consortium's annual costs among MSC libraries, based on the record counts taken from the system on March 1 each year.

Q: What are the consortium's typical ongoing costs, and how much will they be in future years?
A: The consortium's typical ongoing costs include SirsiDynix software licensing, maintenance and support, enriched content such as cover art and reviews, hardware maintenance, authority maintenance, catalog cleanup, training, meeting and conference costs, MSL indirect service costs and 2.66 of the cost for five MSL staff positions that administer and support the system. The total shared costs for FY2017, not counting MSL funded staff, were $465,457. Annual costs can be expected to increase by as much as 4% yearly due to inflation. The state also provides nearly $100,000 per year to the MSC to help reduce the amount of shared, operational costs along with LSTA funds provided for 2.33 staff salaries and new library start-up costs.

Q: How is a library's ongoing cost calculated?

A: A library's individual contribution to the ongoing costs of the MSC is calculated based on a cost share formula that is established by group consensus; every library has an equal vote. MSC's primary concern is to keep prices fair and affordable for all participating libraries (big and small, but taking special care to keep smaller libraries enfranchised), while meeting its financial obligations.

The MSC ongoing cost formula is based on four measures. Those measures are**:** title record (30%), annual circulation (10%) and patron record (30%) counts that come directly from the system. The remaining 30% is divided equally among libraries. Title, patron and circulation record counts are done by system administrators on March 1 each year in order to create the next fiscal year's ongoing cost formula. Member libraries are invoiced by mid-May of each year for the next fiscal year (July 1 to June 30).

The following breaks are included:

    i.   Title record break – libraries with under 10,000 titles records receive a 5,000 title break
    ii.   Patron record break – libraries with under 3,000 patron records will not be charged for patron records
    iii.   Equal share of 30% - libraries with under 8,000 title records AND under 1,000 patron records will pay $200 less than the other libraries sharing the remaining balance equally.

The price structure strives to provide all libraries with a good deal, but takes exceptional care that it doesn't price libraries of any size out of the catalog. It is a delicate balance that is annually re-examined as part of the budget planning process.

Q: How is the MSC staffed?
A: The MSC Director is responsible for supervising MSC staff, coordinating committee and member meetings in cooperation with committee members and staff, planning the fiscal year proposed budget, maintaining administrative paperwork and website information, and negotiating contract renewals. There are three MSC Systems Technicians. These positions provide operational support to existing members and have primary responsibility for specific areas of the system. A fourth position, MSC Trainer, focuses on providing training materials and support.

Staff from MSC member libraries often work with one another to solve problems and train and assist staff at other member libraries. While they are not MSC or State Library paid staff, their voluntary contributions are vital to the sustainability of the consortium.

Q: Do I have to share my materials to be part of the MSC?   What is a resource sharing group? Can I join a resource sharing group later?

A: While joining a sharing group when you join the MSC is not required, libraries are strongly encouraged to consider the benefits of resource sharing for their patrons. If you decide a Sharing Group is right for your patrons you will need to follow the Partners Sharing Group How to Join protocol and work with MSC Admin Staff.

 36 libraries are part of the Partners Resource sharing group and another 12 are part of the 4-Rivers sharing group while five others make up the Gallatin County Libraries sharing group. These groups share their collections and patrons. Their partnership requires special system configuration and a strategy for providing consistent delivery, whether through courier services or shipping. The Partners sharing group also offers floating collections of new materials to their patrons. These items remain on the receiving library's shelf until needed elsewhere, giving the local libraries a "new" set of materials to offer their users on a rotating basis. This has greatly expanded the collection of materials available to their patrons.

Q: Can my library customize the public web view of the MSC online catalog?

A: The MSC catalog is available to anyone, anywhere, anytime, through internet access and a web browser. Users with mobile devices can also access the catalog using the BookMyne application to search the catalog, place holds, view their online accounts, renew items and manage book lists. Patrons can also directly access the catalog through your library's Facebook page.
Our desire to customize the catalog to your library's unique needs and preferences is tempered by finite staff resources and the capabilities and limitations of the SirsiDynix *Symphony* software along with the Enterprise online catalog software.

The Enterprise online catalog is user-friendly and includes search suggestions, "did you mean" functionality, and "facets" to easily scope search results to the desired materials. It also includes enriched content (such as book jackets, table of contents, excerpts, and book reviews). This content is licensed from Bowker Syndetic Solutions, Inc., and your library's share of this consortium-wide cost is part of your ongoing expenses.

Some of the Enterprise screens and options can be customized for your library; other aspects are determined by consortium-related requirements and cannot be changed.

Q: What data can I migrate from my existing system?

A: Bibliographic and item level data migrates well if it is in standard MARC format. Bibliographic records must first be determined by MSC staff to conform to the MSC's bibliographic record standards, as outlined in the MSC's Standard Cataloging Procedures. Bibliographic data that does not meet standards can be migrated on a provisional basis, or retro-cataloged. Patron information can usually be migrated. Some libraries use this opportunity to re-register their patrons in the new system. Circulation, serials, and acquisitions data is problematic and we do not attempt to migrate that data except for very large public libraries or school library districts.

Selected libraries that are migrating will begin a three- to six-month process of importing their records to the MSC. This process will include testing and training timed to meet the needs of new libraries coming online.

Q:	Can we use the MSC to build our bibliographic and patron data files? We have no electronic data files; instead we use a card catalog.
A:	Yes, the MSC is a great tool to use to create an electronic duplicate of your card catalog. We can help you estimate how long it might take to retrospectively catalog your collection manually. Libraries not migrating bibliographic data are required to manually enter 80% of circulating collection no later than one year after joining the MSC.

Q:	Why is a collection management policy required?
A:	Collection management policies are a prerequisite to maintaining a useful collection. Accordingly, the Montana State Library Commission requires grant seeking libraries to have a current (less than 3 years since the last formal revision/update) collection management policy, approved by the library board/school board or principal or administrator.

APPLICATION

Montana Shared Catalog
Start-up Assistance Program

Application Deadline: February 9, 2018, 5:00 PM MST
Complete application must be received at MSL on or before this deadline.

Instructions

- Use the forms provided, answer each question in context and as it is posed on the form, and answer each question completely. Failure to do so makes it difficult to score the application and therefore will disqualify the application.
- Attach supplemental pages and materials as requested or required
- To be considered, libraries must reply to the affirmative to all questions in the Pre-qualifying Questions section AND select an appropriate Implementation Schedule (end of Library Information Questions section).
- Electronic or paper submissions must be signed, dated, and sent to:

    MSC 2018 Startup Assistance Program
    Montana State Library
    PO Box 201800
    Helena, MT 59620-1800

    Applications sent via fax will not be accepted as accuracy and completeness cannot be ascertained.

- corban@mt.gov.
- The application has pre-set forms with shaded check boxes ☐ and text fields   . Simply click in the appropriate check box to select it or inside the text field to begin entering text. Text fields will expand as you enter your answers. You can move from one field to the next by simply pressing [Tab].

Application Checklist
☐ Application
   ☐ Paper or electronic copy in PDF or Word format, Library Information and questions 15 through 43 attached together.
   ☐ Signature Page 16, printed out, signed and dated
   ☐ Response to essay questions 44 through 48
   ☐ A recent (within 3 years), approved Collection Management Policy on file at the Montana State Library.
   ☐ If applicable (un-automated libraries): Retrospective Cataloging Plan, signed by the Librarian and the Board Chair, Principal or equivalent

Signatures

- We certify that this application for the Montana Shared Catalog Start-up Assistance Program is complete and accurate.
- We have attached additional material as requested.

_____

Signature of Librarian or other contact person   Date

_____

Type or print name of Librarian or contact person   Title

_____

Signature of Board Chair, Principal, or equivalent   Date

_____

Type or print name of Board Chair, Principal, or equivalent   Title

Library Information

Questions about your library (form fields will expand as you enter text)
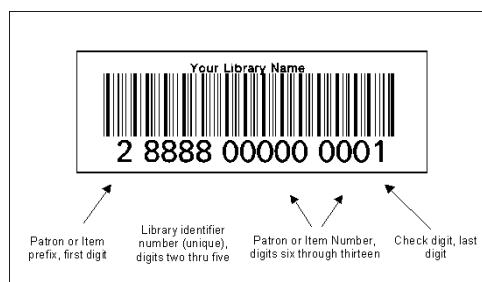
1. Library

2. Mailing Address

3. Contact

4. Contact phone   E-mail

5. Number of branches, if any, in addition to the headquarters library

Questions about your collection and patrons

6. How many titles are currently in the library collection?

7. How many registered borrowers does your library have?

8. Is your circulation automated? Yes☐ No☐
   If Yes, what is your library automation system & version   ?

9. Is your library currently an OCLC member? Yes☐ No☐ *Note that annual enrollment in OCLC is a requirement for all MSC member libraries.

10. Are your holdings in OCLC? Yes☐ No☐

11. Do you wish to migrate your patron records by having them transferred to the MSC electronically, or will you prefer to manually key-in your patron database? Migrate☐ or Manual☐

12. Does your library use barcodes? Yes☐ No☐

   The MSC required barcode standard is:
   - Codabar Mod 10
   - 14 digit
   - Final check-digit
   - All numeric
   - Starting digit of 2 for users and 3 for items

An example is given here.

   What barcode schema does your library use?
   NOTE: If your library uses a different barcode format, please be aware that you will have to re-barcode your circulating collection and patron records upon joining the MSC.

Are you requesting funding?
Please check all the sentences below that best describe your library's intentions and situation.

Does your library need financial assistance?

13. ☐   My library wants to join the MSC and is applying for financial assistance.

14. ☐   My library wants to join the MSC; we are applying for assistance, but will find other funding if we are not selected to receive financial assistance.

15. ☐   My library wants to join the MSC, but without financial assistance we will have to wait for funding.

16. ☐   My library wants to join the MSC; we have our own funding, and are not applying for financial assistance.

Large, Medium, or Small Library?

17. ☐   My library is a Large Library, that is, we have both 100,000 or more bibliographic records, *and* 25,000 or more registered patrons.

18. ☐   My library is a Medium Library, that is, we have both 35,000 to 100,000 bibliographic records, *and* 10,000 to 24,999 registered patrons.

19. ☐   My library is a 'Small Library', that is, we are not a Large or a Medium Library.

No automated catalog; no MARC records

20. ☐   My library has no electronic bibliographic records, but would create its database within the MSC Symphony catalog using the Workflows interface. I understand my library cannot go live until at least 80% of our collection is entered into the MSC database. I further agree to enter at least 80% of my library's items by Sept 30, 2019. Basic "copy-cataloging" training will be provided before beginning to add your records to the MSC database.

21. ☐   (If #20 is checked otherwise, leave blank): I have attached a retrospective cataloging plan that enables my library to meet the twelve month requirement for entering my bibliographic items in the catalog. This plan has been signed by the Librarian and the Board Chair, Principal or equivalent.

22. ☐   MY LIBRARY REQUESTS THE IMPLEMENTATION SCHEDULE SELECTED BELOW. The library staff and library board understand that this selection is final and there is not the option to switch to another implementation schedule following our confirmation of acceptance into the MSC (See Implementation Option details on Page 1 of the application). Libraries migrating their data from automated systems must check their preference of one of the two following implementation schedules. Actual scheduling and final "go-live" dates will depend upon the number and size of the automated libraries joining coupled with MSC and library staff availability:

        ☐ IMPLEMENTATION SCHEDULE 1 July-October 2018

        ☐ IMPLEMENTATION SCHEDULE 2 Jan-April 2019

Pre-Qualifying Questions

The following are requirements for joining the Montana Shared Catalog.
Your Library Must Review and Confirm Statements 23 through 45.

23. ☐ I have read and agree to the MSC By-Laws:
http://msl.mt.gov/Statewide_Projects/Montana_Shared_Catalog/For_Members/Legal/Bylaws.pdf

24. ☐ I understand that the MSC has a limited number of circulation options that govern check out periods and fines and fees, and that my library's circulation policies will need to be in alignment with these policies.

25. ☐ I understand that the MSC has a limited number of item policy options and that my library's item policies will need to be in alignment with consortium policies.

26. ☐ I have received and agreed to price quotes received from the MSC Director for start-up costs as shown in the table below:

Paid to SirsiDynix, MSL project funds (if available)	Paid to Montana Shared Catalog, own funding	Paid to others, own funding	Total Paid (MSL plus own funding)
$	$	$	$

27. ☐ I have received and understand the cost estimate received from the MSC Director for ongoing costs.

28. ☐ My library has a current Collection Management Policy. This policy has been approved by your library or school board/principal. For more information, go to the MSL website at:
http://libraries.msl.mt.gov/library_development/consulting/standards/colleval

29. ☐ My board, superintendent, or other governing body has reviewed and approved this application. They have reviewed the conditions of the MSC Members Contract and will sign it if we join the MSC.

30. ☐ My library will work with other MSC libraries toward improving the quality of library materials and services.

31. ☐ My library will share bibliographic records.

32. ☐ I understand that when joining the MSC, my library will add its holdings to existing bibliographic records in the system. In the event that we add unique records, I understand that others will attach their holdings to this new master record.

33. ☐ My library will actively contribute catalog records following the accepted best practices of the consortium; I have read and agree to the current version of the MSC Standard Cataloging Procedures:
http://docs.msl.mt.gov/pdfs/SharedCatalog/StandardCatalogingProcedures.pdf

34. ☐ I have conferred with the MSC Staff and we have agreed that either 1) our bibliographic and user records are of sufficient quality to electronically import into the MSC, or 2) we will by hand, rebuild our bibliographic database using the MSC's standard cataloging procedures.

35. ☐ I understand the MSC assists other member libraries cooperatively; my library agrees to voluntarily provide training, guidance and consultation to other member libraries.

36. ☐ I understand that my library will receive one comprehensive training at the time we go live, but that I am responsible for reviewing the MSC Curriculum and working with the MSC Trainer to identify appropriate training for

my staff. I am responsible for ensuring that my staff are aware of training resources to help them use the MSC system.

37. ☐ My library will be represented at all regularly scheduled membership meetings of the MSC consortium.

38. ☐ My library is an OCLC member, or will become one no later than July 1, 2018 and will maintain enrollment while a member of the MSC. I understand that OCLC enrollment is required and that it is an additional cost not included in annual MSC membership cost.

39. ☐ My library has, or will have by July, 2018: stable, high-speed internet access with a static IP address with sufficient bandwidth for current and future needs engendered by joining the MSC. We understand that dial-up Internet access is insufficient and that broadband internet is an ongoing requirement. My library is responsible for securing and maintaining adequate data communications.

40. ☐ My library has or will have at least one online catalog workstation or kiosk for patrons.

41. ☐ We have or will have at least one staff workstation dedicated to circulation, cataloging, print notices and reports. We are able to support staff workstations running Windows operating systems (7, 8 and 10) or the Apple Macintosh operating system. The current version of the staff interface (Java Workflows) runs under Windows 7, 8x, 10 or a Macintosh OS X 10.4 or higher version.

42. ☐ We understand that at least one barcode scanner must be purchased if a compatible scanner is not already available. Peripheral equipment purchases are part of the start-up costs borne locally. Contact the MSC Staff to help determine if the current scanner is compatible or for recommendations for scanner purchase. We prefer scanner standardization as it helps us provide better and faster technical support. In addition to the required bar code reader, your library may purchase *optional standard receipt printers* To receive our support for the receipt printers, it is requested you follow the [MSC peripheral equipment](#) recommendations. If your library plans to use mobile devices for circulation, those devices and related peripherals are part of the start-up costs borne locally. Contact the MSC Staff for questions concerning mobile devices.

43. ☐ My library has, or will begin conversion to the MSC standard bar code format, from the time of our notification of acceptance in the MSC:
    - 14 digit "Codabar mod 10"
    - Unique library identifier (contact the MSC Staff to reserve an identifier if not already reserved)
    - Final check-digit
    - All numeric characters
    - Prefixes of "2" for patrons, "3" for item

44. ☐ I understand that my library is responsible for purchasing barcodes for my library's collection. MSC staff will provide contact information for the consortium's preferred vendor.

45. ☐ My library appears with its current information in the online Montana Library Directory:
    http://msl.mt.gov/Library_Development/Library_Directory/default.asp

Essay Questions

Please attach pages as necessary to answer the following questions. Number each response with the corresponding question number. Each question must be answered separately. Your response should be as succinct as possible. Responses will be scored using the following guidelines:

Questions #46, #47 and #48 will be scored according to the extent that your library meets or works to meet, the following standards and goals:

- ✓ Furthers the process of libraries helping libraries
- ✓ Increases collegial interaction between participating librarians
- ✓ Improves the delivery of library materials and services to library users
- ✓ Promotes collaborative and consortium behavior in general
- ✓ Further MSL's goal of developing libraries through networked services
- ✓ Understands that the MSC is primarily a tool for library development and not just an integrated library system.
- ✓ Supports and improves the resource sharing concept of the Montana Shared Catalog.

Question #49 will be scored according to the library's current and future budget capability to pay MSC and OCLC annual membership costs.

Question #50 will be scored according to the library's willingness to participate or consider participating in MSC Partners.

_____

46. Why do you want to join the Montana Shared Catalog? How does joining the MSC fit into your library's development and long-range plan? 20 maximum points

47. Describe how your library will be an active member of the MSC consortium. Please describe previous cooperative, collaborative, or consortium experiences that you, your staff members, or your library has been a part of. How will your staff participate within the consortium? (20 maximum points)

48. Describe your library's current resource sharing activities. Please include, in addition to a description of your activities, interlibrary borrowing and lending statistics from the last complete fiscal year. (20 maximum points)

49. On-going expenses vary with collection size, number of users, and annual circulation. These costs currently range from $900 to $35,000 per year. Please describe your library's ability to meet these ongoing costs. Keep in mind the library must also pay OCLC annual enrollment costs. (25 maximum points)

50. Is your library interested in joining a resource sharing group? Some members of the MSC share patrons, that is, while patrons remain associated with their home library, these patrons have reciprocal borrowing rights in other libraries within the group(s). For instance, a patron of ImagineIf Libraries in Kalispell can place a hold on a book owned by the Glendive Public Library, and vice versa. Sharing patrons has the effect of hugely increasing your library's collection, as well as the number of customers that you serve. 15 maximum points

Questions? Contact MSC Director Cara Orban at corban@mt.gov or 406-444-5350.